

Project Management: Tips, Tools & Tricks for any Type or Size of Library

Kirsten Clark & Kate McCready, April 18, 2018

Introductions



Kate McCready

Director of Content Services



Introductions



Kirsten Clark

Director of Access & Information Services



Agenda

- Your Landscape & Needs Assessment
- Create the Bridge Between Administration & Project Teams
- Project Team Organization/Framework
- Management of Projects vs. _____ project management

Landscape Investigation & Needs Assessment

Higher View

Environment at Your Institution

Project Management Needs

Project Management Appetite

Survey Question

What stage is your libraries' administration at in creating project management standards (e.g., adopting practices, tools, processes) in your organization?

- a). Nothing yet
- b). Just starting
- c). We've had some discussions
- d). We're in the planning phases
- e). We've adopted a plan

Landscape Investigation



Image: <https://www.flickr.com/photos/lwr/837532471> by Leo Reynolds

Landscape Investigation



- **Your Strategic Direction**

Landscape Investigation



- Your Strategic Direction
- **Your Organizational Structure**

Landscape Investigation



- Your Strategic Direction
- Your Organizational Structure
- **Your Work Culture**

Project Management Needs Assessment



What has already happened at your institution in project management implementation?

Project Management Needs Assessment



What's the appetite?

What amount of process will be accepted?



Takeaway #1:

You will learn the
most from
conversations.

Create the Bridge

Between Administration &
Project Teams

What is to be gained?

What stands to be fixed?

What investments do
administrators need to make?

Creating standards in process and
workflow

Survey Question

What frustrates you about how projects are run at your organization?

- Defining them
- Tracking them/receiving updates
- Determining whether or not they've concluded
- Tracking next steps & follow up getting done
- Other

What can be fixed?

- Frustration over projects getting started, but....
 - Defining them
 - Tracking them/receiving updates
 - Determining whether or not they had concluded
 - Next steps & follow up getting done

...can be difficult.




Administrators & team members ~~want~~ need:
easy access to information

Give them a dashboard



You must get commitment from leadership.

com·mit·ment

/kə'mɪtmənt/ 

noun

1. the state or quality of being dedicated to a cause, activity, etc.
"the company's **commitment** to quality"
synonyms: dedication, devotion, allegiance, loyalty, faithfulness, fidelity
"her commitment to her students"
2. an engagement or obligation that restricts freedom of action.
"business commitments"
synonyms: responsibility, obligation, duty, tie, liability; [More](#)

Takeaway #2:

Create and honor
shared expectations.

These Project Aspects are Ripe for Standards

- 1. Writing proposals and gaining approval to move forward**



These Project Aspects are Ripe for Standards

1. Writing proposals and gaining approval to move forward
- 2. Running meetings and tracking outcomes**



These Project Aspects are Ripe for Standards

1. Writing proposals and gaining approval to move forward
2. Running meetings and tracking outcomes
3. **Breaking down work**




These Project Aspects are Ripe for Standards


1. Writing proposals and gaining approval to move forward
2. Running meetings and tracking outcomes
3. Breaking down work
- 4. Tracking work visibly**




These Project Aspects are Ripe for Standards

1. Writing proposals and gaining approval to move forward
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 3. Breaking down work
 4. Tracking work visibly
 5. **Communicating with stakeholders and managing the unexpected**
- 

These Project Aspects are Ripe for Standards

1. Writing proposals and gaining approval to move forward
 2. Running meetings and tracking outcomes
 3. Breaking down work
 4. Tracking work visibly
 5. Communicating with stakeholders and managing the unexpected
 - 6. Identifying roles and responsibilities**
- 

These Project Aspects are Ripe for Standards

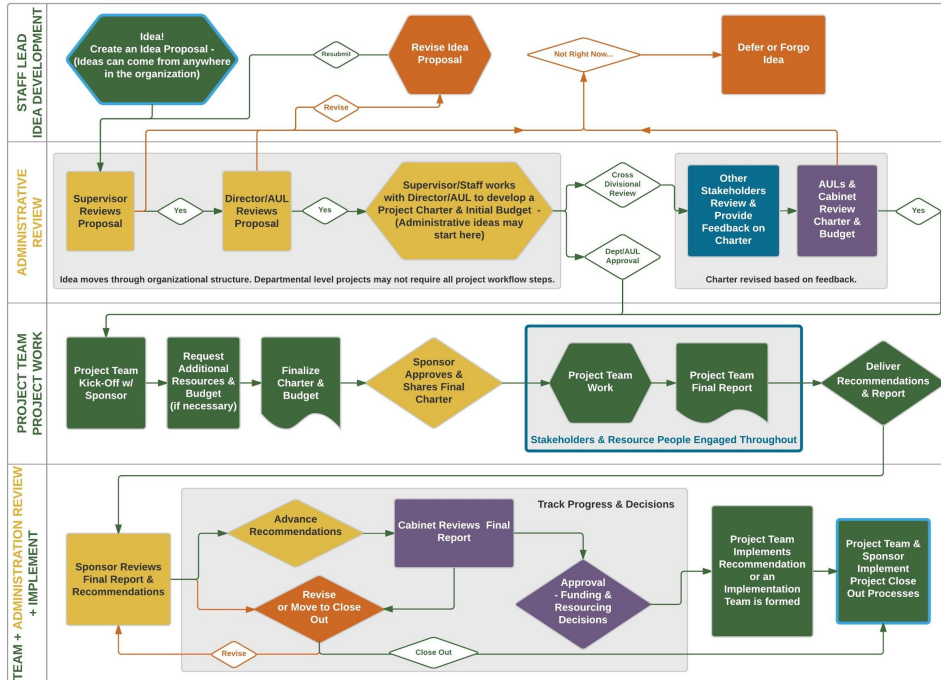
1. Writing proposals and gaining approval to move forward
 2. Running meetings and tracking outcomes
 3. Breaking down work
 4. Tracking work visibly
 5. Communicating with stakeholders and managing the unexpected
 6. Identifying roles and responsibilities
 7. **Closing out projects**
- 

Project Workflow

UNIVERSITY LIBRARIES - PROJECT WORKFLOW

Project Management Processes Task Force, 12/16

From Ideas to Project Completion



Define the ideal path for project workflow at your institution

<https://z.umn.edu/LLAMA-workflow>

Proposals and Teams

Translating an idea into a proposal

Project charters

Team development

Takeaway #3:

A great project
begins with a great
proposal.

A good proposal includes:

LLAMA Webinar: Proposal Template

Your Name(s):

Department/Division:

Date Proposed:

Date Finalized:

Idea Description

Background and Rationale

Key questions to consider include:

- What is the impact of your idea?
- What are the benefits of your idea for the organization?
- Does the idea align with the Libraries' Strategic Plan and with additional division/department goals, if necessary?
- Does your project have a timeline or a planned duration?

Additional questions to consider:

- Does the work span multiple departments/units?
- Why the idea is important? Will it change how the user interacts with the Libraries or change expectations of our users?
- Are there urgencies and/or consequences of not doing this project?
- What goals does the idea support?

LLAMA Webinar: Proposal Template
(<https://z.umn.edu/llama-proposal>)

- Idea description
- Background and Rationale
- Resources needed
- Additional information

Translating an idea into a great proposal

How do I communicate alignment?

Does the idea align with the library strategic goals and/or with additional department/unit goals?

What goals does the idea support?

What are the benefits of our idea for the organization? Does the work span multiple departments/units?

What if the strategic goals or my project scope changes?



What is a project?

UMN Libraries Definition:

A project is defined as individual or collaborative work that requires planning to accomplish specific tasks.



To project or not to project

Yes. Move to the charter development phase.

Yes. Begin implementation. Sometimes when projects are small enough, with limited resource needs, they can be implemented without developing a charter.

No. Be deferred or let go. For a variety of reasons, a project may not be able to move forward at this time. Feedback should be provided on why a project may be deferred (put off until another time) or forgone (declined).



Takeaway #4:

A great project
includes shared
expectations and
defined roles.

A project charter includes:

Template: UL Project Charter

Table of Contents:

- [Background and Purpose](#)
- [Project Relevance to University Libraries](#)
- [Project Sponsor](#)
- [Project Team Members & Roles](#)
- [Project Scope](#)
- [Project Outcomes](#)
- [Project Timeline & Milestones](#)
- [Project Budget](#)
- [Risks & Related Issues](#)

Background and Purpose

A brief description of the purpose of this project, no more than a paragraph or so, which the Libraries can use to accurately portray the intent and scope of this project.

Project Relevance to University Libraries

How does the project fit with University Libraries' Strategic Goals? If the project does not have

LLAMA Webinar: Project Charter Template

(<https://z.umn.edu/llama-charter>)



Background

- Background
- Purpose
- Relevance

Template: UL Project Charter

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Roles

- Project Sponsor
- Project Team Members & Roles

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Project Relevance to University Libraries

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Defining the roles

LLAMA Webinar: Assigning Project Roles for Project Teams
(<https://z.umn.edu/llama-roles>)

- Project Owner (Chair)
- Project Sponsor
- Project Team/Group Members
- Project Resource People
- Project Stakeholders



Shared Expectations

- Project Scope
- Project Outcomes
- Project Timeline & Milestones
- Project Budget
- Related Risks & Issues

Template: UL Project Charter

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Project Relevance to University Libraries

How does the project fit with University Libraries' Strategic Goals? If the project does not have

Management of projects vs. project management practices/tools

Meetings

Communication

Project details

Closeout

Takeaway #5:

Consistent practices
lead to consistent
outcomes and
understanding.

Meetings

Running Meetings

⇒ Managing Project Team Meetings

Having an effective management strategy is one of the main criteria for a successful meeting. A meeting is successful if team members feel that it was productive and they accomplished the objective(s). Elements of effective meeting management include the following:

- [Prepare for the meeting in advance](#) with meaningful agendas (using a standard [agenda template](#)).
- Follow the ground rules set for the project team.
- Track and follow up on decisions, tasks, and assignments.
 - See [Tracking Work](#) for more on using project management tools during or after them meeting to track decisions and action items.
- Summarize the meeting in notes/minutes; clearly record decisions and tasks.
- Ensure that electronic equipment (computer, projector, camera, mic, etc) are available and functional.

⇒ Reaching Decisions in Meetings

Decisions need to be reached and tracked regularly by project teams; however, occasionally the group may have some difficulties arriving at decisions. These best practices outline methods for managing and resolving those situations.

[Training Resource: Meetings - Reaching Decisions in Meetings Best Practices](#)

⇒ Addressing Challenges and Solutions

Effective meetings are always the goal. Agendas, clear objectives, group

LLAMA Webinar - Project Management Process Handbook - DRAFT

(<https://z.umn.edu/llama-manual>)



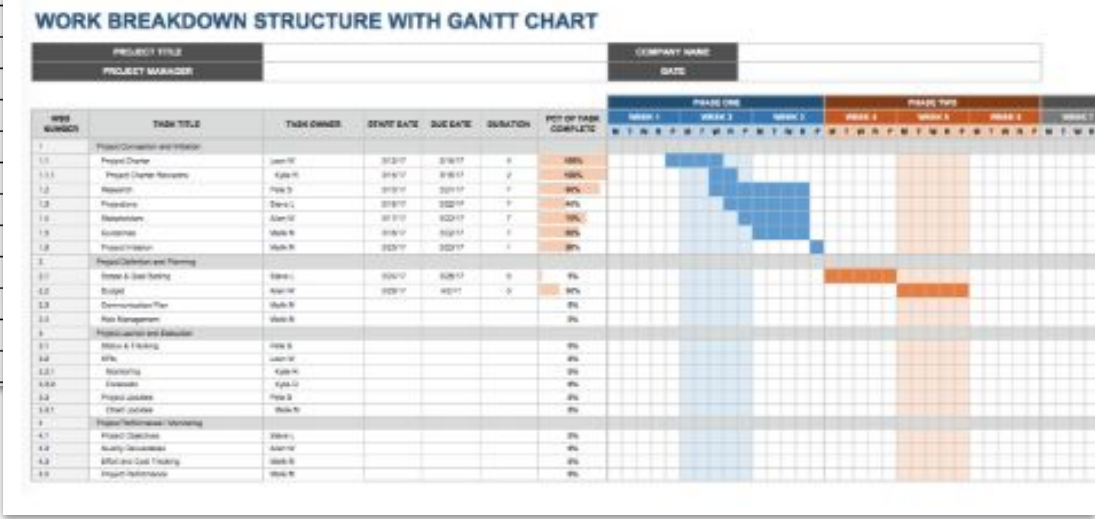
Communication

- Complete
- Concise
 - Considerate
 - Clarity
 - Concrete
 - Courteous
 - Correct



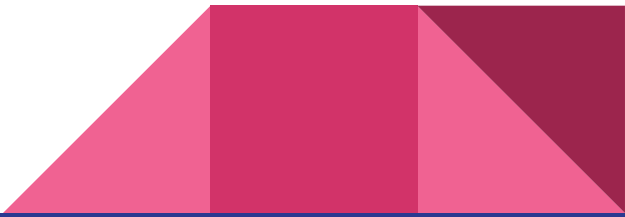
Project Details

| Work Breakdown Structure for [PROJECT NAME] | | | | |
|---|------|---------|--------------|------------------------|
| SubProject | Task | SubTask | Work Package | Level of Effort (time) |
| | | | | |
| | | | | |
| | | | | |



Work Breakdown Structure

- Breaks down work into smaller outcomes and tasks
- Assigns tasks to individuals or teams
- Estimate the time and effort required for each task



Project Closeout - Final Report

- Responds to outcomes of initial charter
- Provides a clear summary of the project work
- Outlines clear direction for next steps / recommendations

Project Management Processes Task Force

Final Report and Recommendations

Final Draft: May 19, 2017


Background

Projects have always been an integral part of the Libraries' workflow from providing opportunities to pilot a new service to ensuring cross-divisional support for new initiatives. As more staff experienced work on a project team, shared best practices for project management have depended more on the expertise of the project staff involved than on a commonly shared set of principles and procedures.

In July 2016, the [Project Management Processes Task Force](#) was created to fill this gap in Libraries-wide understanding of project management techniques, and the project management tools that support them. Specifically, the group was charged to:

Administrative Closeout

The following steps ensure that the tail ends of the project are dealt with and should be completed by the project owner(s) or their designate.

- Collect and archive project documents.
 - Ensure that documentation (and location on Staff Drive) is passed along to the person(s) assigned to next steps, if appropriate.
 - Work with the Libraries Business Office and Sponsor(s) to determine what to do with remaining funds.
 - Update staff/team web pages.
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Celebrate!

⇒ Acknowledging and Celebrating the Project Team's Work

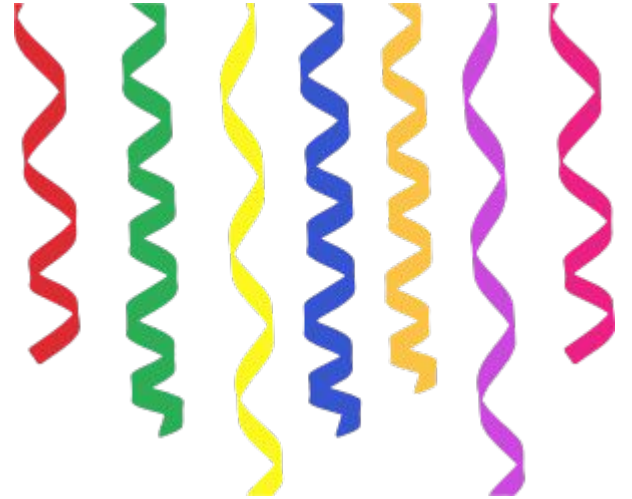
Acknowledging the project finish provides staff involved with closure of a job well done. It also lets library staff across the system know the final outcomes and next steps.

- Send final report to Monday Memo and acknowledge the project members' work.
- Send email to each member and their supervisor outlining their contribution to the project and contribute to annual performance review documents.
- Recognize team and work at next Libraries' Assembly and/or Division Meeting.

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UL Project Management Process Handbook - January 2017

- Plan a fun get-together such as lunch provided by the Libraries, a happy hour after work, or Goldy Game Room / Bowling Party.
- Celebrate!



Final thoughts

Shared expectations

Clear objectives

Engaged staff!

Questions?

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